**Custom Project Workflow**

Require Post-install review

Yes

No

Ex Ante Review

No

Yes

Submit Post-install data

Cancel project

Yes

No

Install Project

Conduct Post-Install Reviews

Close Out Project

Approve Project for Installation

Customer Contractor Payment

Complete Technical Review

Add Project as “Ready” on to CMPA

Complete Application

Conduct Feasibility Study

Identify Project Lead

Selected for EAR

Ex Ante Review

ED approves project

Revise project

No

Yes

Yes

Yes

PA pursues project

Cancel project

Prep/Submit Project Package

Issue Disposition

IOU approves project

No

No

ED approves project

IOU approves project

No

Yes

**Custom Project Workflow – mapping identified Issues**

Require Post-install review

Yes

No

Ex Ante Review

No

Yes

Submit Post-install data

Cancel project

Yes

No

Install Project

Conduct Post-Install Reviews

Close Out Project

Approve Project for Installation

Customer Contractor Payment

Complete Technical Review

Add Project as “Ready” on to CMPA

Complete Application

Conduct Feasibility Study

Identify Project Lead

Selected for EAR

Ex Ante Review

ED approves project

Revise project

No

Yes

Yes

Yes

PA pursues project

Cancel project

Prep/Submit Project Package

Issue Disposition

IOU approves project

No

No

ED approves project

IOU approves project

No

Yes

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Require Post-install review

Yes

No

Ex Ante Review

No

Yes

Submit Post-install data

Cancel project

Yes

No

Install Project

Conduct Post-Install Reviews

Close Out Project

Approve Project for Installation

Customer Contractor Payment

Complete Technical Review

Add Project as “Ready” on to CMPA

Complete Application

Conduct Feasibility Study

Identify Project Lead

Selected for EAR

Ex Ante Review

ED approves project

Revise project

No

Yes

Yes

Yes

PA pursues project

Cancel project

Prep/Submit Project Package

Issue Disposition

IOU approves project

No

No

ED approves project

IOU approves project

No

Yes

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Establish SLA for EAR Timelines

Improve Project Development Process with Effective QC

Make EAR Findings Prospective

EAR Kickoff Meeting (Large Projects only)

Establish/Maintain Project Status Tracker (selection to disposition)

Establish Dispute Resolution Mechanism

Implement EAR Early Review

Implement IOU Early Review

Implement Project Scoping Document

Update Disposition Template/Process to confirm understanding and implications on current/future projects

Establish Clear, Well-Defined Project Rules and Requirements

Establish process(es) to disseminate lessons learned

Establish/maintain library of lessons learned

Establish Tiered Review

Establish update process (incl. communication)

Identify & resolve existing policy confusion or different interpretations



**Summary of Proposals and Issues -** See [Task 6 Issues and Proposals](http://t2wg.cadmusweb.com/Documents/Task%206%20-%20Custom%20Streamlining%20Materials/T2WG_Task6_Issues%20and%20Proposals_DRAFT_20170706.docx) for more detail

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| **Proposal** | **Type of Change** | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **13** | **14** | **15** | **16** | **17** | **18** |
| **Scope/Purpose of EAR** | **Unfair EAR Selection** | **Extra Effort Makes EAR Not Representative** | **Incomplete Project Packages** | **Ineligible/Inaccurate Assumptions in Projects** | **Unclear Expectations (Not that rock!)** | **Issues detected too late** | **EAR Process Too Long** | **Tracking Project Status** | **Communications on Projects through EAR** | **Broken Feedback Loop** | **Inordinate EAR for Small Projects** | **EAR Re-calculations** | **Implications of EAR Selection on other projects** | **ISP Delays** | **Moving Goalposts** | **Disputes on EAR Dispositions** | **Differing Policy Perspectives** |
| **Identify & resolve existing policy confusion or different interpretations** | **Clarification; Documentation** | **X** |  |  |  | **X** |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Establish Clear, Well-Defined Project Rules and Requirements** | **Clarification; Documentation** |  |  |  | **X** | **X** |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Establish update process (incl. communication)** | **Process** |  |  |  |  | **X** | **X** |  |  |  |  | **X** |  |  | **X** |  |  |  |  |
| **Improve Project Development Process with Effective QC** | **Process** |  |  |  | **X** | **X** | **X** | **X** | **X** |  |  |  |  |  |  |  |  |  |  |
| **Implement Project Scoping Document** | **Process** |  |  |  |  | **X** |  | **X** |  |  |  |  |  |  |  |  |  |  |  |
| **Implement IOU Early Review** | **Process** |  |  |  |  | **X** |  | **X** |  |  |  |  |  |  |  |  |  |  |  |
| **Implement EAR Early Review** | **Process** |  |  |  |  | **X** |  | **X** |  |  |  |  |  |  |  |  |  |  |  |
| **Make EAR Findings Prospective** | **Policy Change** |  |  |  |  |  |  |  | **X** |  |  |  |  |  | **X** | **X** |  |  |  |
| **Establish SLA for EAR Timelines** | **Process** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **EAR Kickoff Meeting (Large Projects only)** | **Process** |  |  |  |  |  |  |  | **X** |  | **X** |  |  |  |  |  |  |  |  |
| **Establish Tiered Review** | **Policy Change** |  |  |  |  |  |  |  | **X** |  |  |  | **X** |  |  |  |  |  |  |
| **Update Disposition Template/Process to confirm understanding and implications on current/future projects** | **Documentation** |  |  |  |  |  | **X** |  |  |  | **X** | **X** |  |  | **X** |  |  |  |  |
| **Establish process(es) to disseminate lessons learned** | **Process** |  |  |  |  |  |  |  |  |  |  | **X** |  |  |  |  |  |  |  |
| **Establish/maintain library of lessons learned** | **Process** |  |  |  |  | **X** | **X** |  |  |  | **X** | **X** |  |  |  |  | **X** |  |  |
| **Establish/Maintain Project Status Tracker (selection to disposition)** | **Process** |  |  |  |  |  |  |  | **X** | **X** | **X** |  |  |  |  |  |  |  |  |
| **Establish Dispute Resolution Mechanism** | **Process** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | **X** | **X** |
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